



Advanced Planning Resources

POWERED BY CUNA MUTUAL GROUP

Complex
Situations
Require
Comprehensive
Well-Thought
Strategies.

**ELEVATE™ — ADVANCED
PLANNING RESOURCES:**

A self-serve library of resources for advisors, backed by an accessible support team. We're here to help you meet your clients' unique needs, and elevate your reputation and expertise with ease.

DISCOVER HOW HIGH YOU CAN GO WITH ELEVATE™.

Advisors are looked to for informed, valuable guidance. When it comes to clients' individual, specific planning needs, support from your CUNA Mutual Group team can help you truly enhance those important client relationships.

Elevate™ Advanced Planning Resources library covers a multitude of scenarios and delivers assistance with complex strategies to build your business and boost your value.

GET QUICK INSIGHTS INTO COMPLICATED PLANNING SCENARIOS.

We provide meaningful strategies to help you stay on the edge of today's ever-evolving financial and regulatory environment and assist clients in ways that matter... all so you can confidently meet their needs. You can depend on our support when you need it the most.



Access the library at
smartriskcontrol.com/elevate

MEET THE EXPERTS

Bring your advanced retirement planning and questions to CUNA Mutual Group's Advanced Planning team. Put Marshall and Sonja's 45 years of combined experience to work for you.



Marshall Heitzman, CFP®, ChFC, FLMI, CPCU, BFA™
CUNA Mutual Group | VP, Advanced Planning Consultant



Sonja V. Hayes, J.D., LL.M, M.B.A., CLU
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Ready to get started? Call your wholesaler or 877.345.GROW (4769) option 1.
Rise above the ordinary for your clients with Elevate™.

Contact the **CUNA Mutual Group Annuity Sales Team:**



877.345.GROW (4769)



smartriskcontrol.com

CUNA MUTUAL GROUP

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